The Future Of Converged Infrastructure And Integrated Systems

A multi-client research proposal from The METISfiles and ITCandor

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WE HELP YOU

Understand your customers and their business pain points

Position your solutions, articulate your business value and create thought leadership

Understand the competitive environment and market dynamics and find new market opportunities

Find new routes to market and build market power through alliances and partnerships

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Introduction

Vendors are shifting towards supplying new types of integrated systems incorporating server, networking, storage and infrastructure software. Users are considering integrating their fragmiented data centre equipment in order to simplify their operations, cut internal staffing costs and increase business agility. Converged infrastructure solutions that package servers, storage, networks, and orchestration software in a single system or rack are becoming increasingly popular. Software defined networks (SDN) open up today's vertically integrated distributed control networking gear and allow standard switch hardware to be controlled centrally via OpenFlow through an SDN controller. Cloud management platforms (CMPs) start to automatically provision server, storage, and network resources. These are just 2 examples of how innovative technology is being applied to our subject.

There is an urgent need to assess the connections between supplier push and user pull and calculate the chances and timescales for success. With our strong heritage in systems, software and networking research we are uniquely positioned to help meet the needs for business planning information and are keen to help.

We propose a combination of expert interviews with both vendors and users, augmented with desk research and expert analysis. This will deliver three reports, containing vendor competitive analysis, user wants and needs, and market share, size and forecast respectively.

Your Benefits

This multi-client study will help you:

- Understand your customers and their business pain points
- Position your solutions, articulate your business value and create thought leadership
- Understand the competitive environment and market dynamics and find new market opportunities
- Find new routes to market and build market power through alliances and partnerships

Our research is designed to help you, whatever type of supplier you are. In particular:

- Systems vendor - gain insight into the wants and needs of your data centre customers and the software defined data centre
- Software or CMP vendor - gain insight into server, storage and networking infrastructure usage, strategies and trends
- Storage or networking vendor - gain insight into server and software infrastructure usage, strategies and trends
- Startup vendor - get insight into market opportunities not yet addressed by established vendors
- Datacentre infrastructure manager or CTO - get insight into your peers wants and needs, vendor roadmaps and vendor strengths and weaknesses

Report 1 - Competitive Analysis
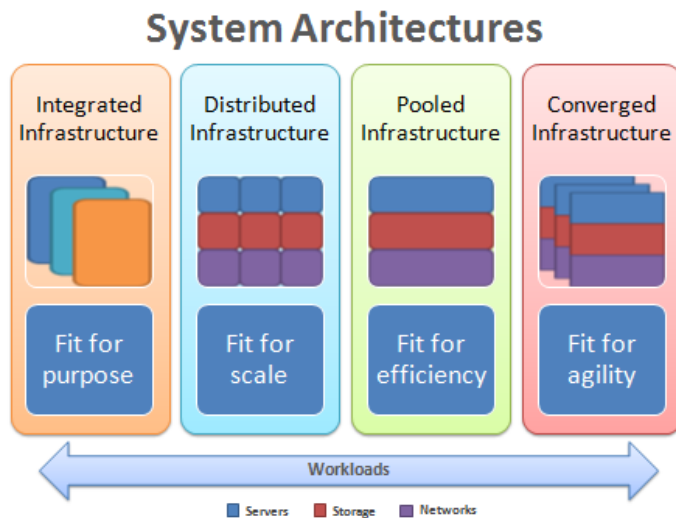
We will define, size and look at the success factors for Converged Infrastructure vendors, differentiating these from earlier styles of systems (see Figure above). We will report on the evolution of Matrix Integration strategies. Our findings will be based on a detailed analysis of the main system contenders, including :

- Cisco - Unified Computing System
- Dell - Active System
- Fujitsu – Converged Infrastructure
- VCE - EMC/VMware/Cisco Vblock
- HP - Converged Infrastructure and Mission-Critical Converged Infrastructure
- IBM PureSystems
- Oracle/Sun Exadata
- NetApp - FlexPod
- HDS - Unified Compute Platform
- EMC - VSPEX; Greenplum
- Huawei - FusionCube
- SAP - HANA

We will provide a SWOT analysis of each, identifying current strengths, investments and challenges. We will also look at other relevant software (such as Red Hat, VMware and Citrix) vendors, networking vendors, storage vendors and a number of startup suppliers. We are particularly interested in how Converged Infrastructure offerings relate to the system vendor's overall strategy, which we see evolving towards Matrix Integration (see Figure next page).

Supplier Strategy
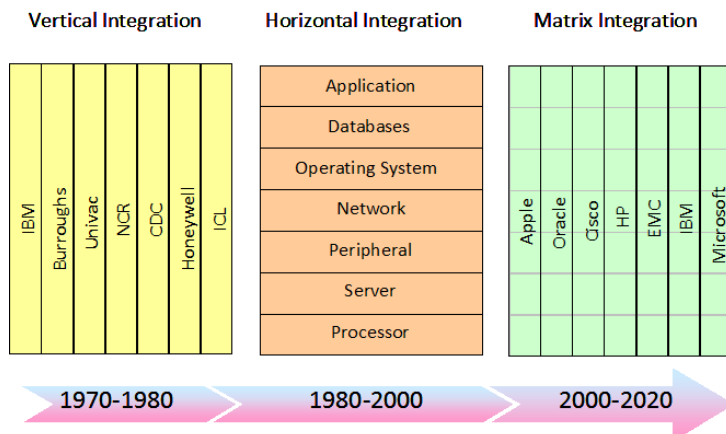
Report 2 - User Perspectives

Our qualitative interview programme will cover 30 leading user organisations with the aim of discussing current and future adoption of integrated systems and converged infrastructure. We will balance our sample between those implementing, considering or avoiding these types of systems, as well as between Public Cloud, Service Provider, IaaS and PaaS suppliers, ISVs and End-User organisations. We aim to be wide-ranging in our geographic coverage, including companies in the Americas, EMEA and Asia Pacific. We will analyse the changes in purchasing authority and influence implied in the consolidation of previously disparate offerings, especially as it relates to changes in data centre management and the current specialised roles of IT staff. The results of this survey will provide insight into real-world positioning and marketing, as well as help in finding inflection points and forecasts.

Report 3 – Market Sizing and Forecast

Using the vendor and user input and ITCandor's existing market database - tracking and forecasting the global ITC market by vendor, country, and product - we will report market shares by region and forecast the uptake of integrated systems and Converged Infrastructure by quarter to 2017.

Recommendations and Delivery

We will deliver our findings via teleconference to sponsors, including kick-off, interim and final findings. We are also happy to answer related questions through enquiries during and after the research time frame. Full delivery of our findings will be completed by the end of June 2013.

Our Credentials

This research is being undertaken by Pim Bilderbeek and Martin Hingley of METISfiles and ITCandor respectively. Between them they have over 50 years experience in sizing and forecasting Enterprise IT and data centre business and have worked successfully in bringing insight and value to ITC suppliers.

For more information on Pim Bilderbeek and The METISfiles please visit:

http://www.linkedin.com/in/pbilderbeek or http://www.themetisfiles.com

For more information on Martin Hingley and ITCandor please visit:

http://www.linkedin.com/in/martinhingley or http://www.itcandor.net

Commercial Terms

This multi-client research is priced at £9,000.

Contact

To learn more about this essential multi-client project please contact:

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